



Ohio

Montana

Oklahoma

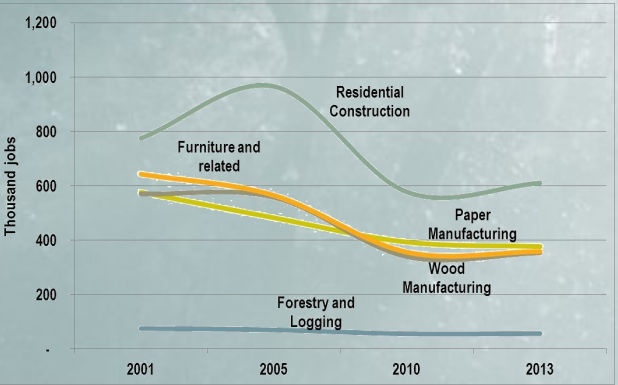
New
Hampshire

Illinois

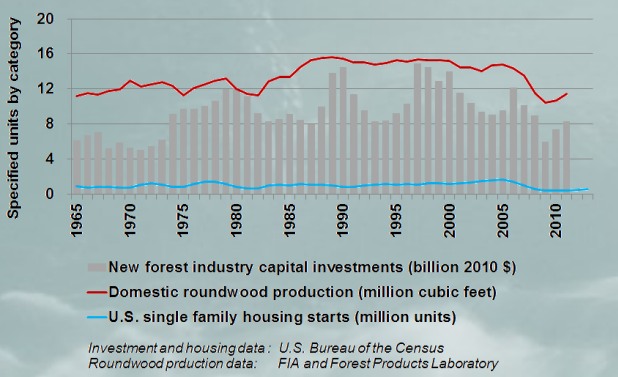
Maryland

Recession and Recovery

Prior to the recent recession, forestry related employment was nearly 2.7 million jobs in 2006 but dropped to 1.7 million by 2011. Recovery is apparent in construction, wood manufacture and furniture related jobs but paper manufacturing jobs continues to lag— a trend since the late 1990s.



Since 1965, forest related industries have made capital investments of over \$445 billion. At the same time, roundwood production remained steady at 12 to 15 billion cubic feet annually while overall forest inventories rose 37 percent, suggesting further investment opportunities are available.



Investment and housing data : U.S. Bureau of the Census
Roundwood production data : FIA and Forest Products Laboratory

As the recession recedes, rising new investments are pointing the way for returning jobs and new wood markets. Capital investments in sawmills, particularly in the South, are encouraging signs of recovery as housing starts and wood manufacturing related jobs slowly climb.

Additionally, newer products such as U.S. wood pellets are showing a competitive advantage in world markets and investments in the U.S. forest sector are on the upswing as well. Market analysts suggest exports of pellets are could easily double over the next 5 years.

Financial fund managers rely on FIA data to evaluate future stability of natural resource based investments. Opportunities such as nanotechnology are emerging and information on supplies and sustainability of raw fiber materials can be provided by FIA. Research funding programs like McIntire-Stennis rely on FIA productivity data to allocate funds.

New Strategic Plan for FIA

FIA is currently preparing a new strategic plan in response requirements of the 2014 Farm Bill. This plan lays out several options for moving FIA forward by both maintaining its traditional clients as well as pursuing the vision of serving a broader coalition of forest related clients that lean toward ecosystem services dependent on information about carbon sequestration, urban forest attributes, biodiversity, etc. Serving a broader client base will require new research as well as new monitoring strategies and FIA is positioned to provide this improved program in a timely and scientifically sound manner. Several funding opportunities are outlined to provide varying levels monitoring capability. Congress will determine the appropriate activities and funding level for the strategic forest monitoring needs of the nation. A \$1 billion investment for sound data supporting \$445 billion in capital investments and 2.7 million jobs is food for thought in deciding which option to choose going forward.



Indiana

Alaska

Vermont

New
Mexico

Connecticut

Colorado



Forest Sector Investment

*data supporting sound investments
for over 80 years, provided by:*

For more information on FIA

Visit the FIA national web site at <http://www.fia.fs.fed.us> or contact one of the offices below:

Washington, DC
703-605-4177



North
St. Paul, MN
651-649-5139

Interior West
Ogden, UT
801-625-5407

South
Knoxville, TN
865-862-2000

Pacific West
Portland, OR
503-808-2034

The United States Forest Service *Caring for the Land and Serving People*

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July 2014



FIA Mission: Improving the understanding and management of the nation's natural resources by maintaining a comprehensive inventory of the status and trends of our diverse forest ecosystems, their use and health for over 80 years.

Science Serving Society



Forest Service—Research and Development

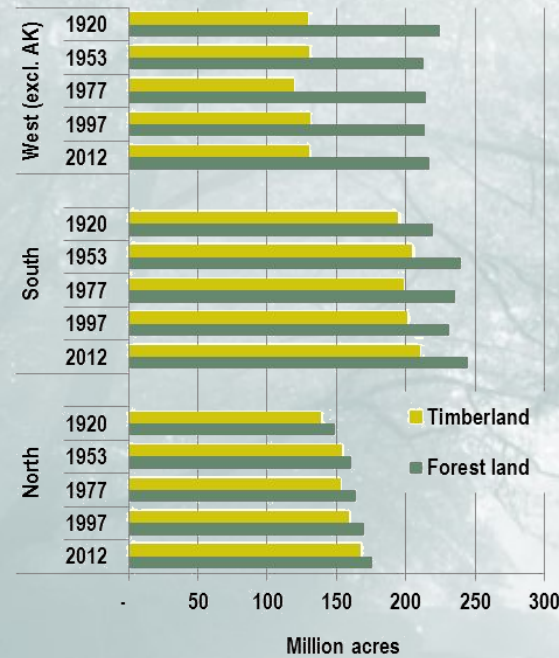


What is the FIA Program?

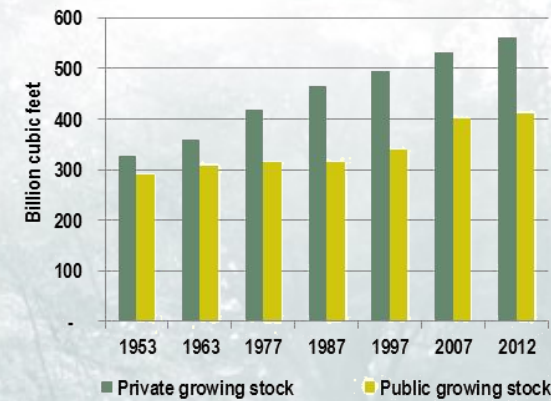
- FIA, authorized by the Forestry Research Act of 1928 (replaced by the Forest and Rangeland Renewable Resources Research Act of 1978), is an 80+ years strong forest inventory partnership with the nation's state forestry agencies, universities, NGOs and others.
- FIA is the only comprehensive field-based inventory of all forest ownerships for each of the 50 states, affiliated Pacific Islands, Puerto Rico, and the U.S. Virgin Islands (since 1928).
- FIA has conducted wood flow surveys of all primary wood-using facilities in the U.S. since 1947. These surveys gage the capacity and health of the primary wood processing industry and provide data for analysis of future investment opportunities.
- FIA conducts surveys of the management objectives and value of forests of over 10 million private forest landowners in the U.S. (since 1953) including their attitudes about harvesting timber. Ninety percent of the nation's annual timber cut comes from private forests.
- FIA provides public access to current and historic resource data through user-friendly online tools with over 100,000 data accesses in 2013. Forest industry is one of the largest assessors of FIA data.
- FIA conducts extensive collaborative research to develop and use the latest technology in remote sensing, field measurement and information management.
- FIA data has underpinned billions of dollars in forest industry capital investments over the last 80 years which help support nearly 2.7 million forest related jobs.

What FIA data tells investors

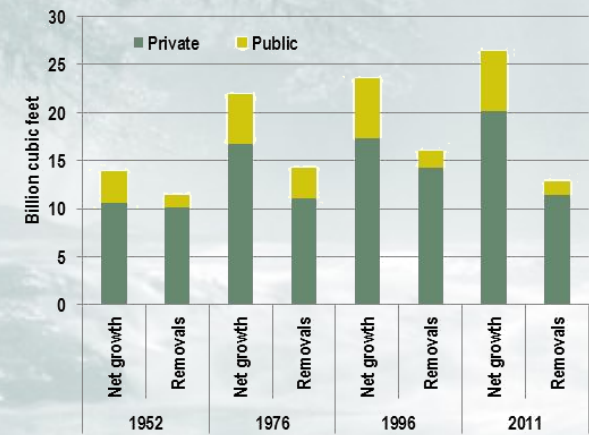
A sound forest economy relies on an available forest land base to provide materials, sound management practices and a monitoring system that assures sustainability of resources and supplies. While shifting regionally, the forest land base of the United States has been stable for nearly 100 years.



With the timberland (productive, unreserved forest land) base remaining stable and harvest levels remaining steady at levels below average annual increment, growing stock volumes have increased by 37 percent since 1953. Available data includes tree species, height, diameter, and quality measures as well as geographic location from public online databases.



Recent surveys indicate that 58% of private forest owners have commercially harvested trees. And, these owners supplied nearly 90 percent of the nation's timber production, predominantly from the South. Monitoring the demographics, goals and management objectives of private forest landowners has been part of the FIA program since 1953.



FIA—A Sound Investment

The total budget of the FIA program for the last 50 years has been one billion dollars. Since 1987, FIA partners have contributed more than \$120 million to leverage the program for local needs. And, since 2000, FIA has provided over \$40 million to more than 50 universities to conduct research to improve FIA technology and efficiency.

From FIA Client's Perspective



National Association of State Foresters-

"Our nation's forests play an important role in the health of our environment and our economy—providing clear air and water, wildlife habitat, recreational opportunities, renewable forest products, enhanced property values, and good-paying jobs." "FIA is the only national inventory system that delivers timely and consistent information about the condition and trends of America's forestland, across all types of ownerships. FIA is essential to land managers in order to make sound ecological, economic, and social decisions about the current and future state of the nation's forests." (NASF statement on the FY 2014 budget.)



National Council on Air and Stream Improvement (NCASI)

"FIA provides valuable information on: forest area and condition, timber and biomass supply potential, growth versus removals, rates of forest conversion to non-forest use, carbon stocks, and biodiversity."



Southern Group of State Foresters -

"FIA provides objective and scientifically credible information, and is part of the universal benchmark for measuring the sustainability and success of natural resource and land management practices. The accurate and timely results help landowners make informed decisions about managing their land, provide a basis for environmental policy makers and regulators to develop public policy on forest use, and serve as a valuable resource for leaders making economic development decisions."

